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PREPARING COAST GUARD  
OFFICERS TO MANAGE CENTRAL  
SUPPLY DEPARTMENTS

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## **Executive Summary**

### **PREPARING COAST GUARD OFFICERS TO MANAGE CENTRAL SUPPLY DEPARTMENTS**

Recently, the Coast Guard decided to centralize supply operations aboard its cutters under a supply department managed by a supply officer. As a key element in this new centralized approach, the supply officer must be selected and trained to fill the dual role of executive level department manager and technical level supply system analyst. The success of the approach depends upon how well the supply officer fulfills the role — how well he/she provides sufficient high-quality supplies to the operational departments at the lowest reasonable cost. In turn, the success of the supply officers depends strongly on their selection and training and the assistance and support provided by the command channel.

Successful supply officers cannot be randomly selected nor casually trained. Capable supply officers will be the product of careful selection of top quality performers, training in the technical areas of supply management, the assignment of responsibilities consistent with that training, and assistance from the cutters' technical and command channels. The selection and training processes must be continually improved through evaluations of shipboard performance by a central manager who can then direct the necessary changes in the processes.

The Coast Guard does not have a formal process for selecting and training supply officers to manage a unit's central supply department or for evaluating the effectiveness of the training. We believe it needs one and recommend that it establish a formal process with the following key elements:

- A procedure that selects officers with demonstrated leadership and managerial abilities. Additionally, the selection procedure should consider the officer's willingness to deal with an intense training course and to accept the responsibilities for planning and directing a support program affecting all other departments in their unit.
- A requirement that officers attend a formal supply management training course (initially the Navy's Supply Indoctrination for Line Officers and

eventually a Coast Guard-unique course) to acquire the technical skills needed to review, analyze, and direct the supply operation.

- A program for evaluating training effectiveness that involves the supply officer and the unit's commanding officer, and – as an integral part of technical assistance visits – the Inventory Control Points' customer liaison offices, and the Area Maintenance and Logistics Commands' inspection offices.
- A method for reviewing training shortfalls and correcting those training deficiencies through changes in curriculum topics, emphasis on specific subjects, or publication of supplemental training information.

Additionally, we recommend the process be placed under the Coast Guard headquarters staff supervision of the Chief, Logistics Management Division, Office of Engineering and Development, as an adjunct to its responsibilities as the supply program manager. The Officer Personnel and the Performance Systems Divisions, Office of Personnel and Training, should assist the Logistics Management Division in planning, developing, and implementing supply officer selection, training, training effectiveness evaluation, and training curriculum improvements.

The supply officer's responsibilities are not easily fulfilled. He/she is expected to make efficient use of the resources placed under his/her control and to contribute to the cutter's readiness through effective support of the other departments' plans and operating requirements. A well-trained, challenged, and committed officer will meet those expectations and will find the supply department assignment aboard ship to be an enhancer to his/her career, self-confidence, and capabilities. He/she carries that first-hand experience to future assignments and is able to be more effective because he/she realizes the benefits possible through well planned, coordinated, and integrated management of supply support.

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## CHAPTER 1

### INTRODUCTION

The principal objective of (military) supply management is to achieve efficient, economical, and practical operation of an integrated supply system to meet the needs of the Service without duplicate or overlapping operations or functions. Realization of this aim requires that the individual supply manager examine his operations continuously in terms of what is being done and how efficiently it is being done. <sup>1-2</sup>

Supply managers, military and civilian, hold the key to success in the supply management process. The principal objective of supply management can be achieved by trained and experienced supply management officers exercising leadership and making decisions at each level of the supply support system. 1-3

#### ACTION ON PREVIOUS RECOMMENDATIONS

Among other recommendations in our previous reports<sup>2</sup> are ones related to supply management officer assignments, training, and supply operations management. Specifically, we recommended that the Coast Guard create supply officer assignment billets aboard major cutters, institute initial supply officer training, and establish a supply management officer career pattern; revise its planning objectives and policies for supply manpower management; and centralize supply operations aboard major cutters. The Coast Guard has not yet fully adopted and implemented our recommendations; however, those recommendations have influenced critical decisions on billet structure, supply officer training, and supply department organization for manning the initial high endurance cutters being released to active service from the Fleet Rehabilitation and Modernization (FRAM) project.

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<sup>1</sup>U.S. Department of Defense. *Supply Management Reference Book*. 1 Jan 1985. p. 29-1.

<sup>2</sup>LMI Report CG701R1. *Improving Shipboard Supply Management in the Coast Guard*. Slyman, George L., et al. Oct 1987.

LMI Report CG701R1 Supplement. *Focusing Planning for Supply Management: Objectives and Policies, Oversight and Review*. Slyman, George L., et al. Apr 1988.

## **Billet Structure and Training**

The Coast Guard has established supply officer and assistant supply officer billets on the post-FRAM high endurance cutters (WHECs) and has assigned a Lieutenant as supply officer to head the centralized supply department and a warrant officer as the assistant supply officer. That action has precipitated the requirement for a training program to properly prepare the supply officers for the post-FRAM WHECs and for like positions aboard other major cutters. The Coast Guard does not have an in-house training program for those supply officers because it has never before needed to offer such comprehensive training.

Until now, the Storekeepers (SKs) or Fiscal and Supply (F&S) warrant officers have been responsible for general stores and materiel procurement supply management at the shipboard level; and spares, repair parts, and equipment-related consumable supply management has fallen primarily to the using departments. The SKs had the benefit of the rating entry-level (the "A" school) training, and the F&S Warrant Officers (commissioned from the SK and Subsistence Specialist ratings) relied on hands-on experience plus self-directed training.

The Lieutenants reporting to the WHECs for duty as the ships' supply officers will have had no formal training unless they were previously F&S Warrant Officers. Thus, formal supply management training is a critical factor for Coast Guard shipboard supply officers – Lieutenants or Warrant Officers – if they are to be successful directors of supply support and productive contributors to the operational readiness of their cutters.

## **Supply Organization**

The Chief of Staff's policy memorandum<sup>3</sup> on centralized supply operations had a direct effect on the organization and responsibilities of ships' supply departments. Centralized supply operations increase the time and workload demands placed on shipboard supply personnel and place supply support at a new level of visibility as full responsibility for management of the shipboard system devolves to the department. The central figure in the shipboard supply operation is the supply officer. To respond to the ship's demands, the supply officer must be trained to deal

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<sup>3</sup>Memorandum to the Comptroller. From RADM Clyde T. Lusk, Jr., Chief of Staff, U.S. Coast Guard. Subject: *Post-FRAM 378 WHEC and Other Cutter Logistics Issues*. 31 Jul 1987.

with the functions of a centralized supply operation. That training reduces the learning curve and enables the supply officer to step in and assume responsibility for the central supply department. Without adequate training, a shipboard supply officer must struggle to learn on-the-job while only acting as a figurehead.

## **SUMMARY**

The success of the centralized shipboard supply support operation depends on the supply officer's preparation for his/her assignment and the quality of his/her performance. A detailed course of instruction, professionally presented, teaches the responsibilities of the position and establishes the expected performance level. The officer's personal leadership and management skills are the tools with which those responsibilities are accomplished efficiently and effectively. The supply officer's success in directing the supply operations on the first post-FRAM cutters will validate the decisions that placed them aboard initially, and will justify continuing the program of providing formal training in supply management to junior officers and warrant officers.

## **REPORT CONTENTS**

In this report we describe the shipboard supply officer's role, qualifications, and selection (Chapter 2); discuss alternatives for providing initial supply management training (Chapter 3); describe the primary and secondary responsibilities of the shipboard supply officer (Chapter 4); and propose a procedure for follow-on evaluation of the supply officer's training and training-related performance requirements (Chapter 5). Appendix A discusses automated supply system training. Appendix B describes the supply officer's posttraining review survey and provides a sample format for conducting an initial and a follow-up evaluation.



## **CHAPTER 2**

### **ROLE, QUALIFICATIONS, AND SELECTION**

Potential supply officers must possess certain basic qualifications and must acquire others through training. In this chapter we describe the dual role of the Coast Guard supply officer in a centralized supply environment aboard ship, we specify certain basic and acquired qualifications needed for success in those roles, and we recommend a procedure for selecting well qualified officers to be shipboard supply officers.

#### **SUPPLY OFFICER'S DUAL ROLE**

Aboard ship, a Coast Guard supply officer must function as an executive level manager and supply system analyst. The supply officer is expected to (1) organize the department in such a way that responsibilities are correctly assigned, (2) systematically audit the records and review reports to evaluate performance and identify problems, (3) correct any problems that can be resolved aboard ship, (4) seek higher level support through the supply technical channel to resolve problems outside shipboard capability, (5) assist the other department heads in improving their internal supply procedures, and (6) advise the Commanding Officer on the status of the supply system supporting the ship and the performance of the supply department.

The supply officer's leadership and management role is clearly that of an executive, but executive talent alone is not enough. Each supply officer must be trained in the technical aspects of supply management in order to audit and analyze the supply operation. To fill such a dual role, the supply officer must combine the basic skills of a leader and manager with the supply system analytic skills acquired from the supply management training.

#### **BASIC QUALIFICATION SKILLS**

Personnel being considered for assignments as shipboard supply officers should be carefully screened for past performance and experience, future potential, and — most important — their attitude about the job that they will be performing. If

they view the assignment as easy, nonchallenging, or underutilizing their capabilities, they may be unwilling to deal with the intensity of the training course or ultimately be unable to adjust to the burden of responsibility of the position. If, on the other hand, they see it as an executive level, business-oriented challenge with a future and an opportunity to head a department contributing directly to the ship's readiness, they are excellent candidates for success.

Managing a centralized supply operation is a difficult task and one that must be taken seriously by the officer who will be doing it. Care must be taken to ensure that the candidate is a quality performer. An underachiever is not likely to fulfill the shipboard supply officer's responsibilities successfully or to find the assignment one to turn a career around. For the quality officer, however, it is a positive career opportunity:

- An excellent operations officer can use the assignment to expand an understanding of the complexities and interrelationships of the cutter's support functions.
- A graduate in business or finance can test management theories and develop experience in system control techniques while gaining the specific career benefits of an afloat assignment.
- An engineering officer can use the training and shipboard tour to enhance knowledge of supply and procurement management — two major functions that along with maintenance constitute the "mainstream" of logistics.

An outstanding officer — regardless of primary specialty — who is successful as a shipboard supply officer can use that experience to open new assignment opportunities in higher level supply management planning and logistics management positions.

An officer selected for the shipboard supply position should have certain leadership and administrative abilities before the initial training. Among those responsibilities are basic understandings of (1) departmental organization and communication; (2) techniques of long- and short-term planning; (3) duty and task scheduling; (4) departmental training and rating qualification procedures; (5) administrative support; (6) the purpose and benefit of internal and external inspections; (7) subordinate management development; and (8) standards of conduct and their related fraud, waste, and abuse issues. An officer develops and demonstrates these basic qualification skills in earlier assignments and they should

not have to be taught again in the initial training. The screening process should attempt to uncover any weaknesses in those areas. In the event of doubt about a potential selectee's basic qualifications, the officer should not be selected or the selection should have the concurrence of the Chief, Logistics Management Division (G-ELM), Office of Engineering and Development.

## **ACQUIRED QUALIFICATION SKILLS**

The objective of the initial supply officer training is to provide the skills needed for the shipboard assignment. The training focuses on the technical side of the operation primarily from the supply officer's perspective. It provides enough detail on the Storekeeper's tasks for the supply officer to understand and appreciate them and to oversee their performance. As a manager, the officer must be familiar with the concepts of accountability and responsibility, how they are applied, and how they affect the shipboard supply operation. Additionally, the officer learns to be a manager and not a supply department operator. The Storekeepers are the operators and are under the intermediate supervision of the assistant supply officer or the Chief Storekeeper. The supply officer manages them as a departmental crew — weighing tradeoffs of time and setting priorities on their collective effort — to improve productivity and supply responsiveness. To manage them correctly requires a basic knowledge of the technical tasks they are performing, and that knowledge is provided during the initial training.

Part of the initial training also deals with the auditing function of supply management. The auditing method of oversight and review gives the supply officer control of the supply operation and an indication of the quality of the supply support system's performance. Audit techniques learned during initial training are refined and enhanced with experience. If the shipboard operation is running correctly, the supply officer has little need for excessive management. If an audit of key records reveals the supply operation to have fallen below an acceptable performance level, managerial decisions and directions are needed. Auditing helps the supply officer direct attention to areas most in need of management. It can keep problems from escalating or prevent them from occurring. It is among the most important skills the officer takes from initial training to a shipboard assignment.

Supply officers are not expected to be the day-to-day shipboard experts in the detailed processing of supply-related transactions; they rely on the assistant supply

officers or the Chief Storekeepers for that level of expertise. Supply officers have to be able to discuss supply subjects intelligently and recognize potential conflicts in procedures and policy. To do so, their initial training must provide a sufficient depth of knowledge in the supply management areas for which they are responsible. Those areas are (1) the structure of the supply support system, (2) shipboard inventory and financial management, (3) shipboard requisitioning and local purchase, (4) configuration status accounting, and (5) customer support. In Chapter 3, we describe the areas of supply management that should be covered in the initial training course.

## SUMMARY

To successfully carry out a shipboard assignment, a supply officer must meet certain qualifications. First, potential selectees must have a proven performance record in leadership and management skills. Second, they must fully understand the relationship between supply performance and readiness, and must be willing to accept the responsibilities previously shared by several department heads aboard ship. Finally, they must demonstrate an understanding of the technical aspects of supply management by satisfactorily completing the initial supply officer training course. With the basic and acquired skills solidly in place, the supply officer is properly prepared to take over the central supply department and fulfill the executive manager-supply system analyst role.

## RECOMMENDATIONS

Selecting well qualified officers for supply officer training and assignment to the supply department billets is a critical first step in the long-range plan for Coast Guard supply management. To ensure that properly qualified officers are in fact selected, we make the following recommendations:

- The pool of officers considered for the training should include those in the Operations, Engineering, and Comptroller primary specialties; and the description of career assignments in the *Officer Career Guidebook* (Commandant Instruction M1040.2) for officers in those specialties should include the supply management career pattern.<sup>1</sup>

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<sup>1</sup>The supply management career pattern is discussed in Part IV of our report titled *Focusing Planning for Supply Management: Objectives and Policies, Oversight and Review*, April 1988. The career pattern alternates the officer between tours in his/her primary specialty and tours in supply management positions throughout the structure of the supply support system.

- The selection of officers for the supply departments of the post-FRAM high endurance cutters should be concurred in by the Chief, Logistics Management Division, Office of Engineering and Development.
- The Coast Guard should develop and publish an information pamphlet on the qualifications and responsibilities of the supply officer and the opportunities for assignment and experience from participating in the supply management career pattern.

Additionally, we recommend that the officer's initial training focus on the supply officer's management responsibility and accountability for the technical aspects of the central supply department, and the techniques for auditing the shipboard supply operation and the shoreside supply support system. Acquiring those skills in initial training prepares the supply officer to deal with the challenges he/she faces as the head of the cutter's supply operation.

We believe that implementing these recommendations is significant in publicizing the supply management career pattern, attracting quality officers to it as a compatible and enhancing alternative to their primary specialty, and preparing the supply officer for his/her role as the head of the shipboard central supply department.

## CHAPTER 3

### TRAINING ALTERNATIVES

The objective of the supply officer's initial training is to furnish the technical and system management knowledge necessary to direct the operation of a centralized supply department. Currently the Coast Guard does not have a training course that meets this objective.

In this chapter, we discuss several alternatives that provide short- and intermediate-term training needs and consider the necessity for establishing a specific Coast Guard course to meet the long-term needs.

#### INTERIM TRAINING ALTERNATIVE

The Navy has operated centralized supply departments aboard ships for many years and has trained officers to manage those departments. For the most part, the training is given to Navy Supply Corps officers who head central supply departments on large ships. Additionally, the Navy Supply Corps School (NSCS) provides special training for unrestricted line officers who will be the managers of supply departments aboard select classes of smaller surface and subsurface vessels. The Navy's Supply Indoctrination for Line Officers (SILO) course is specifically designed for naval vessels without a Supply Corps Officer billet. It is a very low-cost alternative for starting a Coast Guard training program since excellent instructors and facilities are immediately available. However, while it represents an immediate capability, the SILO course may not be the solution for long-term Coast Guard training. To determine its value, the Coast Guard must decide on its future requirements and consider comments from Coast Guard graduates of the course, and weigh the results against the cost and benefits of a specific Coast Guard course.

For now, the SILO course is available as an interim program that meets some of the Coast Guard's immediate training needs. For the short term, building the training program around the SILO course presents several training options and each option has some advantages and disadvantages.

### **Option 1: Navy Supply Indoctrination for Line Officers (SILO) Course**

The first option is to rely on the SILO course as it exists today. Under that option, the Coast Guard would use the Navy's version of the course and Navy instructors and facilities. It represents the lowest cost program for the Coast Guard since it involves paying only the temporary duty expenses of the officers attending the course. The primary disadvantage is that SILO is a Navy course targeted toward Navy officers and addressing the Navy supply system. Although Coast Guard officers would learn the basic principles governing a centralized supply operation, certain topics in the curriculum (e.g., Navy organizational structure and Navy financial reports) are of marginal value to the Coast Guard system. Instruction in those marginal value topics could detract from the interest level of a Coast Guard officer, particularly one who does not completely understand that the goal of the course is to gain an overall understanding of the supply officer's responsibility and the operation of a supply system rather than to master the fine details of the routine procedures. Additionally, other topics not included – such as the Coast Guard's allowance systems, personal property accounting, and budget and expense reporting procedures – are ones the supply officer needs and require that he/she receive the training on-the-job or through self-instruction. Other disadvantages are the course frequency (twice a year) and class size (12 – 15 students). They limit the number of officers the Coast Guard can train to fill the billets for the supply departments on the post-FRAM WHECs and other cutters or shore units converting to centralized supply operations.

Under this alternative, the Navy would provide the training resources and training school student spaces. While there is no guarantee of a permanent allocation of quotas for Coast Guard officers, the Coast Guard can document a formal relationship with the Navy in a memorandum of understanding to establish a procedure for requesting allocations and a method for coordinating changes between the two Services if the Navy is forced to reduce training to meet resource cutbacks.

### **Option 2: Tailored SILO Course**

A second option is to continue the use of Navy's SILO resources but tailor the curriculum to address Coast Guard-unique policies and procedures. Under this option, the course would not be changed for Navy students; but for Coast Guard students, topics unrelated to the Coast Guard supply system would be replaced with

separate pertinent instruction. The course would offer the benefits of the Navy's experience in managing a centralized supply operation while meeting the specific management requirements of the Coast Guard students. The product is an improved curriculum for the Coast Guard participants.

This option remains a relatively low cost one for the Coast Guard since Navy resources would be utilized for the training. Several issues must be resolved to make this option a viable one: (1) responsibility for developing the curriculum changes must be assigned, (2) procedures must be developed to convey and integrate the changes with the rest of the instruction, (3) a method must be devised to train the Navy instructor to present the Coast Guard-unique topics, and (4) the subject schedules must be arranged and classroom hours set aside to permit logical interrelating of Coast Guard-unique topics with the applicable topics from the basic course curriculum. This option requires that the Coast Guard remain dependent on the Navy for facilities and resources, and that the Navy commit a part of its instructor's preparation time to Coast Guard topics. A memorandum of understanding outlining the basis for the relationship and defining the support requirement, the conditions for its continuation, and the coordination required for termination will aid both Services in justifying mission and resource changes.

### **Option 3: Coast Guard SILO Instructors**

The third option is an expansion of the second option in which the Coast Guard portion of the curriculum would be taught by a Coast Guard instructor. The instructor would either be permanently assigned to the NSCS staff or on temporary duty at the school for the Coast Guard portion of the course. Since the SILO course is only taught twice a year (5 weeks each), a full-time Coast Guard instructor would be an underutilized asset unless given other responsibilities outside the classroom. Although a portion of the nonclassroom time is required for curriculum maintenance and preparing new Coast Guard-unique topics, the instructor could also be involved in developing and presenting a Coast Guard orientation to Navy Supply Corps officers attending other courses, serving as Coast Guard liaison with the Commandant (G-ELM/G-PRF), and participating in introducing new or changed general subject material in the common curriculum.



The option offers several added benefits:

- A Coast Guard officer's presence on the faculty would show that the Commandant is committed to support the supply management training program.
- A Coast Guard instructor would know the Service's culture, organization, and vocabulary and would relate to the students in a more personal way.
- The instructor resource would be a Coast Guard asset, and the Navy would only need to support the unique instructional materiel administratively.
- The Coast Guard instructor would have an excellent opportunity to expand his/her supply management knowledge and be a more effective performer when returned to a staff or operational billet.
- The instructor billet at the NSCS would be a valuable and attractive assignment in a supply management career pattern.

This option has the following disadvantages: (1) a potential exists for underutilizing the instructor, (2) a scarce officer billet must be created or allocated from another unit or staff organization, and (3) the instructor would be relatively isolated from other Coast Guard training programs and their faculty.

A Coast Guard supply officer who has completed an initial tour on a modernized 378' WHEC would be an excellent candidate to serve as an instructor. The officer, with recent experience aboard ship, would be in a good position to know the curriculum changes or updates needed to tailor the course to the Coast Guard's requirements. It could be 2 years or so before a supply officer from a centralized shipboard supply department becomes available. In the meantime, the Coast Guard could assign a selected senior F&S Warrant Officer with an extensive background in afloat supply management as the initial instructor to get the program underway.

If the Coast Guard decides not to establish a permanent billet for an instructor or if it is established but personnel resources delay the permanent assignment of an instructor, proper screening and selecting should produce a temporary instructor. The temporary duty instructor could be assigned from a full-time position at Headquarters, a Headquarters Unit, or the Training Center, Petaluma, and be on-call to teach only the Coast Guard-unique portion of the course. The total temporary duty time is about 4 weeks a year (2 weeks per class). The Coast Guard should not find that assignment too costly nor should the individual find it too inconvenient. The greatest disadvantage is the possibility that instructional quality will be

degraded if the officer is required to transition and reorient from an unstructured daily routine of staff-level problem solving to the rigorous format of the academic environment. Making this change twice a year places stress on the officer who has to impress the Coast Guard students and the Navy faculty on the importance of the unique topics. The stress is greater if different officers are sent to provide the instruction to each new class.

Regardless of the assignment status, the program benefits from the Coast Guard instructor's presence. Although the cost to the Coast Guard is higher than for an all-Navy program, it is still comparatively inexpensive. The overall quality of the training product is improved, and the instructor's presence is a positive sign that the Coast Guard is willing to underwrite a part of the cost of developing a trained and ready shipboard supply officer.

### **LONG-TERM TRAINING ALTERNATIVE**

The SILO course – in its traditional form (Option 1), tailored to Coast Guard needs but with Navy instructors (Option 2), or tailored and augmented with a Coast Guard instructor (Option 3) – offers a viable and relatively low-cost approach to training officers as shipboard supply managers. We believe it is the right approach as a start-up program for the small number of officers needed for the modernized high endurance cutters and for continuing training as the supply management career pattern goes through its fledgling period. However, we do not believe it is the solution to the training requirements to support the long-term objectives of a standard supply management system operating within a highly responsive, centrally directed, integrated logistics support structure.<sup>1</sup>

### **Influencing Factors**

Providing trained supply officers for the post-FRAM WHECs represents the initial part of the total training requirement. Other factors that have little influence in the short-term are considerably more significant in the long-term. The factors exerting influence on decisions affecting the long-term training program are:

- The Coast Guard has an increasing requirement for trained officers to head shipboard central supply departments as they are established on the

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<sup>1</sup>Our previous reports cited on page 1-1 describe the organizational structure for integrated supply and maintenance management and recommend the long-term logistics planning objectives and policies.

medium endurance cutters and icebreakers; and as central supply departments are introduced in shoreside units, for supply officers for the patrol boat squadrons, Support Centers, large Groups and Bases, and Ship Support Facilities.

- A sustaining pipeline of trained officers is needed to replace those supply officers in the afloat and ashore units as their tours are completed.
- The Coast Guard needs to train supply officers to manage its standard automated system for supply management and an advanced version of the automated system for integrated logistics management aboard ship and at shoreside units with central supply departments. Automated supply system training is discussed in more detail in Appendix A.
- The availability of F&S Warrant Officers for shipboard or shoreside unit supply officer billets may decline as demands for more fiscal management lead a number of them to concentrate on the highly specialized and technically rigorous requirements of the finance and accounting system.

The influencing factors described above address the long-term training requirements for supply officers for the Coast Guard's unit level central supply departments. Additionally, the centrally directed supply management system in the integrated logistics support structure needs trained supply managers. The following factors influence training requirements for supply managers in the support structure above the unit level:

- Inventory Control Points will continue to make advances in materiel management concepts and procedures to integrate supply, maintenance, and procurement planning; in configuration status accounting; in critical reparables management; and in system performance oversight and analysis.
- Longer range supply management planning will become more sophisticated to meet expanding mission requirements and to support evolving a true Coast Guard-unique system of reporting, establishing key performance standards, and directing changes to suit the special demands placed on the Service.
- The skills of trained supply officers who have been alternating duty in the supply management career pattern will have to be updated so that they can fill supply/integrated logistics management positions on a project management staff, on the Headquarters staff, in a Headquarters Unit, or at a joint-Service planning command.

The decision on the long-term training program should consider the future direction of supply management and be made with an awareness of the factors

outlined above and their influence on the total training requirement for Coast Guard unit level supply officers and the support structure's supply managers.

We believe the total training requirement is significant enough to warrant development of a permanent Coast Guard-specific training program. We recommend a supply management training program – with the unit level supply officer's training course structured as described below – be established at the Coast Guard Training Center, Petaluma.

### ***Training Structure***

The unit level supply officer's training course requires time and effort to design, develop, and implement. The effort starts with a decision on a structure around which to design the course. The SILO course organizes supply management into five instructional areas:

- ***Supply System Overview.*** Presents the organization structure and functional relationships of the entire system and the role of the supply officer in providing responsive supply support.
- ***Configuration Management and Material Identification.*** Describes the relationship between configuration management and logistics support; and identifies the various management documents available to the supply officer for identifying material needed to support his/her unit's configuration.
- ***Inventory Management, Material Issue, and Procurement.*** Discusses the mainstream procedures for controlling stocked and nonstocked items, issuing items to users, and ordering items for stock or for direct issuance to users.
- ***Material Receipts and Transfers.*** Describes the actions taken preceding, during, and following receipt of material; similar actions for material being returned or transferred; and special procedures for repairables, personal effects, and controlled items.
- ***Purchasing, Allowances, and Financial Management.*** Discusses the procedures for (1) local purchase of stocked or nonstocked material, (2) maintaining the allowances documentation, (3) conducting inventories and resolving discrepancies, and (4) recording financial accounting information and analyzing financial reports.

We believe this structure provides a fundamental and suitable guide for a unit level supply officer's training course and a baseline for adapting applicable portions of the SILO course to the curriculum that meets the specific needs of the Coast Guard.

### ***Training Site***

We believe the ideal site for a new Coast Guard supply management training program is the Training Center, Petaluma, where the Storekeeper "A" school is currently located. A synergistic effect occurs from the collocation. By the time a supply management training program is collocated, the "A" school curriculum should already be teaching entry-level Storekeepers an introduction to centralized supply procedures and the responsibilities of the supply department. The new training program's curriculum can capitalize on the existing instruction and be incorporated to aid the supply officer in understanding his/her role in the management of the supply department. The refresher or advanced-level training for the Storekeeper "C" school can be developed with these curricula as a baseline and focus on the direct supervisor's responsibilities for central supply procedures.

As supply policy and procedures change with time, the various curricula and course contents can be updated concurrently ensuring that supply officers, senior Storekeepers, and entry-level Storekeepers receive the same information in the detail appropriate for their responsibility. Additionally, the supply program's instructor staff will be an excellent source of input for improved procedures, analysis of system change proposals, and recommended policy changes. Their instructional skills and familiarity with supply procedures are a high quality resource in developing exportable, off-site, and crew update training; and their use offers an opportunity to reduce the cost of contracting for those services. Finally, as with most school staffs, the supply management program's instructors are a valuable concentration of expertise because of their knowledge of supply management theory and procedures, collective experience, and independence of thought.

### **Benefits**

A Coast Guard-specific supply management training program – structured and located as we recommend – offers the following benefits:

- The course curriculum, class size, and frequency can be adjusted to accommodate the influencing factors (increasing requirements for supply officers, need for a sustaining pipeline of trained officers, advanced or

refresher supply management training for assignments in the supply support system, etc.) as they develop or are forecast to occur.

- The Coast Guard can control the program to meet its specific needs for both unit level and supply support system supply management training.
- Training schedule planners and assignment detailers will be faced with fewer training space cancellations or shortages because the program does not depend on another Service's allocating training resources or changing course frequencies.
- Collocation with existing Storekeeper entry-level ("A" school) training enhances instructor effectiveness and injects the incremental resource increase for refresher or advanced-level ("C" school) training for the Storekeepers.
- The Coast Guard has the opportunity to introduce innovative approaches to integrated training with automated supply system exercises and simulations involving the "A," "C," and supply officer students playing real-life roles while they learn the system's operations and management.
- Civilian supply managers can attend a Coast Guard-specific training program rather than the generic or partially inapplicable instruction offered by the General Services Administration or the DoD schools.
- The graduates of the various supply courses are more productive from the outset because their training is directly applicable to their Coast Guard job and responsibilities.

### **Costs**

The long-term training alternative is not without cost. While the Training Center, Petaluma, appears to be the best location for the program, the availability and adequacy of the facility has to be determined. The courses must be outlined, lesson plans and transcripts developed and maintained, and qualified instructors found and trained. The personnel management system must be keyed for training quotas and attendee assignment schedules rearranged.

The major effort is involved in planning the new program, getting approval for the added many years in training, and establishing the budget requirement for start-up costs to establish the course. After the initial new program costs, the costs for sustaining the program should be treated as recurring requirements in the Coast Guard's training budget. Depending on the resources committed to planning and implementing the program's start, it could take 5 or more years for the program to

reach the desired level of productivity. Only after a near-term effort is made to get the resource requirements into the Coast Guard's program and budget cycle and the resources are committed to establish the training can the long-term benefits of an in-house Coast Guard supply officer's training course begin to be realized.

## **IMPLEMENTATION RECOMMENDATION**

We recommend that training of officers in supply management be implemented in three phases. In the short-term the Coast Guard should use the Navy's current SILO course to train the shipboard supply officers because of its low cost to the Coast Guard and immediate availability. The second phase should be a SILO course tailored to the specific needs of Coast Guard supply officers and with an experienced, full-time Coast Guard instructor for those portions of the course unique to the Coast Guard. The final phase should be to establish the Coast Guard-specific supply management training program at the Coast Guard Training Center, Petaluma.

We also recommend the Coast Guard formally request that the Commanding Officer, Navy Supply Systems Command (NAVSUP), provide assistance in developing the plan and resource estimates for establishing the supply management training program. The assistance should be in the form of a Navy Supply Corps officer with experience as an NSCS instructor and shipboard supply operations. By attaching an officer with those qualifications to G-ELM or at NAVSUP as a full-time or primary liaison with G-ELM, the Navy's expertise in supply training would be available to help get the Coast Guard's supply management training program underway.

We believe that by implementing our recommendations, the Coast Guard will bring into being the most beneficial supply management training program possible. It will take 3 - 5 years to plan and execute the training program, but that timeline is consistent with the program and budget cycle. Additionally, during that period, the supply officers from the initial group of post-FRAM high endurance cutters become available to serve as instructors. Their shipboard experience and knowledge will be appropriate and valuable in developing the curriculum, creating an integrated training structure, and instructing the students of the new supply management training program.

## **CHAPTER 4**

### **SUPPLY OFFICER RESPONSIBILITIES**

The shipboard supply officer's foremost concern is with the supply management function, and his/her primary responsibilities are those directly related to the supply operation. Maintaining a high performance level in the centralized supply department is the primary concern and requires the most time and energy. However, in some circumstances, the supply officer could fulfill other, complementary secondary responsibilities regardless of the primary workload. Ideally, the secondary responsibilities will be ones that contribute to the supply officer's general experience in management activities or expand his/her basic knowledge of routine cutter operations. In this chapter, we describe the supply officer's primary responsibilities in detail and provide a general discussion of those secondary responsibilities that could be assigned to him/her.

#### **PRIMARY RESPONSIBILITIES**

The supply officer's primary responsibilities center on the supply management function. With centralized supply, those responsibilities are more diverse than before and encompass all the fundamental functions of supply management: inventory management; financial management; configuration status accounting; management analysis and auditing; interfacing supply and maintenance operations; and subordinates' development, or the training and developing of supply personnel. As an extension of centralized supply, the subsistence management function is also a supply management responsibility when assigned to the supply officer.

#### **Inventory Management**

Inventory management occupies the greatest portion of the supply officer's time. It includes regulating and directing requirements determination, procurement, storage, and disposition of material. Specifically, it entails requisitioning material from various supply system sources and local purchase to replenish stock or for direct turnover; and the receipt, storage, and issue or transfer of that requisitioned or purchased material. This responsibility is more difficult and demanding than in the past because the Coast Guard centralized supply concept



mandates that the supply officer perform those functions in support of all shipboard departments. The supply officer's ability to properly manage the ship's inventory and all the related functions (requisitioning, receipt, stowage, and issue) directly affects the operational readiness of the ship. In a centralized supply environment, the supply officer can be held responsible for repair parts not being available or for failure to provide any other supply support. A significant portion of the supply officer's initial training is concentrated on the theory, principles, and basic procedures of shipboard inventory management that enable him/her to analyze the supply system and identify and correct support problems.

### **Financial Management**

The supply officer is the ship's financial manager and is responsible for preparation of budget requirements and distribution of funds to shipboard departments and accounting for the obligation and expenditure of funds. The supply officer controls the ship's annual funds operating target (OPTAR), records departmental expenditures against their budget, and advises the departments on their funding balance. The supply officer also prepares financial reports required by the shoreside financial system and serves as the central point of contact for all financial matters of concern on the ship.

### **Configuration Status Accounting**

Configuration status accounting involves maintaining an accurate inventory of all equipment/components on board. To do so the supply officer must (1) establish procedures to identify any changes to the ship's equipment/components (i.e., additions, deletions, modifications, or alterations); (2) document those changes and report them to the responsible shore activity; (3) incorporate change information into the ship's selected records (allowance documents, equipment/property accounting documents); and (4) obtain the necessary logistics support for the identified equipment/components (technical manuals, repair parts support, and equipment related consumable materials). The supply department is the central processing point for any changes in the ship's configuration, and the shipboard supply officer is the central figure in the control of the configuration record and must understand the interrelationship of inventory management and configuration status accounting. The supply officer implements the configuration status accounting process and ensures that user-level procedures are implemented in the other departments. If the

ship does not record and report its configuration changes, the needed repair parts and consumables will not be on board — not necessarily because of poor stock control but rather because the supply officer was unaware of a configuration change, did not document it, and did not procure the required support. In the worst case, a ship could carry a sizeable repair parts inventory that is largely a mismatch for its current configuration. Equally bad, the supply officer could be documenting 100 percent of the ship's configuration changes, but poor inventory management procedures could waste the effort by having few of the needed repair parts on hand or on order.

The supply officer ensures that the ship's inventory management and configuration status accounting complement each other and that one is not amplified at the expense of the other. They are of equal importance to the quality of supply support and should receive equal emphasis in the supply officer's training program.

### **Management Analysis and Auditing**

Management analysis is a broader task than inventory management, financial management, and configuration status accounting. It is the application of the supply officer's managerial skills in analyzing the systems at key points to determine whether they are performing as desired. The analysis measures the results of inventory management, financial management, and configuration status accounting and relates those results to the ship's operational mission capability. In a well-defined and smoothly operating supply department, the analysis of the systems can simply consist of verifying results against performance standards, but since not all supply departments are well defined and smoothly operating, the analysis must often take the form of a supply audit. The audit is an evaluation, internally or externally directed and conducted on a periodic schedule, to ensure the integrity of internal controls and the accuracy of various reports and records. Auditing provides a method of oversight and review to gauge how the operation is running and the degree to which proper procedures and policy are being followed.

Through auditing, the supply officer incorporates performance indicators to enable him to evaluate the performance of his supply support operation and also to project future trends, requirements, and remedies. He can then effectively develop management plans to meet those needs. The initial training program provides the systems theory, and the supply officer's management skills apply that theory to analyzing and auditing the support operations.

## **Supply/Maintenance Relationship**

The supply officer is responsible for ensuring the supply department has an open and mutually supportive relationship with the maintenance sections aboard ship. The application of leadership skills creates a departmental "customer service" attitude of responsiveness to the needs of the maintenance function. Correspondingly, the supply officer's management skills influence the maintenance sections to forecast recurring supply support requirements and to include the supply department in planning alterations or overhauls. The importance of the supply/maintenance relationship should be a point of emphasis in the supply officer's initial training. The result of a positive two-way commitment to a harmonious relationship should be visible in the overall readiness of the ship

## **Management of Subordinates' Development**

To develop his/her subordinates, the shipboard supply officer must monitor the supply training program and provide career counseling for the supply crew. The quality of the supply operation is heavily influenced by the supply officer's commitment to training the ship's supply personnel, and his/her ability to inspire and motivate them to achieve the department's objectives as well as their personal and professional goals. Although senior enlisted members provide the detailed instruction, the supply officer monitors and evaluates supply training to ensure that it is valid, realistic, meaningful, and documented. The supply officer must become personally interested in the professional development of personnel and furnish the guidance and incentive for their career progression. Initial training and job experience gives the supply officer the foundation and confidence for the role of a career counselor.

Supply department personnel training carries over into training of personnel of other departments. That training focuses on how the shipboard technicians can help their departments by correctly preparing required forms, reporting configuration changes, turning in repairables for retrograde, being aware of unusual usage patterns for an item, researching a repair part for on-board substitutes before initiating procurement, and preparing input to the central supply department to maintain allowance documents. As those technicians know and understand supply procedures better, they develop a cooperative attitude and supply support improves proportionally.

The supply/user relationship works two ways: (1) supply department personnel must establish an attitude of service to all other customers, and (2) customers facilitate their task by following established procedures. The supply officer's responsibility is to ensure that both aspects of the relationship are followed.

### **Subsistence Management**

When management of the shipboard food service operation is under the control of the supply officer, it is considered a primary responsibility. The supply officer should be properly trained for this responsibility. As a subsistence manager, the supply officer is concerned with the financial accounting or recordkeeping function of the kitchen and food service operations and for ensuring accountability and sanitation are maintained. The training should familiarize the officer with the forms, records, and reports of food service accountability; inventory procedures; sanitation and nutritional standards; cycle menu preparation; and galley management.

### **SECONDARY RESPONSIBILITIES**

The shipboard supply officer's first concern is with the performance of the supply operation. As a department head, the responsibilities of directing the centralized supply department require considerable time and energy. A well-directed and responsive supply operation can make a significant contribution to the cutter's readiness condition. It is important that the supply officer's secondary duties complement those primary responsibilities and not be so burdensome as to divert management effort from the supply operation.

### **Collateral Duties**

Collateral shipboard duties should be limited to tasks that relate to the supply officer's primary tasks. Serving as the internal review officer, the nonappropriated fund account auditor, or the chairman of the Human Relations Council complement primary responsibilities. Serving as administrative assistant to the Executive Officer, a boarding officer, or as customs officer could become so demanding that the supply officer would be distracted from managing supply support.

## **Watchstanding**

The decision to include the supply officer on the watchstanding schedule during underway periods is one the Commanding Officer should make after considering such factors as: (1) the quality of supply support and his expectation for improvements, (2) the officer's primary career speciality and the need to maintain a certain level of experience, (3) the number of other officers available for bridge watch and their morale if the supply officer is excluded, and (4) the supply department's anticipated workload and the capability of the other members to manage the effort. The key is to balance the demands on the supply officer's time so that supply management responsibilities do not have to be delegated to make time for watchstanding requirements.

When assigning watchstanding duties for in-port periods, the Commanding Officer should give special consideration to the ship's maintenance plan. If the maintenance workload is heavy, the supply department must coordinate component and repair parts requirements during the planning phase and provide continuous support while the maintenance is being performed. Additionally, the in-port periods are critical for validating system configurations, inventorying and replenishing stock, reviewing stock consumption and stockage levels, and preparing special stockage requirements for the next underway period.

## **SUMMARY**

The supply officer is responsible for controlling and directing the efforts of the central supply department. The quality of his/her performance is directly reflected in the quality of the supply operation. At the center of those responsibilities are managing the ship's inventory and financial programs; and accounting for the ship's equipment, equipage, and property. Proper execution of those responsibilities – combined with skilled leadership of the supply crew and careful analysis and auditing of the supply operation – results in more responsive supply support, reduced maintenance downtime, and increased equipment readiness.

## **RECOMMENDATIONS**

To successfully control and direct the central supply department, the supply officer must be prepared to fulfill his/her assigned responsibilities. We recommend the training program be based on the fundamental functions of supply management

described above and that those functions be assigned as the shipboard supply officer's primary responsibilities. Additionally, we recommend the supply officer be assigned only those collateral duties that complement the performance of the primary responsibilities or enhance his/her contribution to the ship's readiness.

## CHAPTER 5

### EVALUATING SUPPLY OFFICER'S TRAINING

In the future, the effectiveness of the Coast Guard supply management training program will be visible in the quality of the supply officer's effort and his/her contribution to the operational readiness of the unit and in the performance of the shipboard supply department. Ideally, measurements of those characteristics will provide both point-in-time and recurring indications of the successes being achieved in supply management and operational readiness. Such measurements are difficult to quantify, require a high degree of objective evaluation, and need a baseline – a standard – for comparison. The quantification techniques, analytical skills, and baseline data presentation take time to develop and refine. Until they are available to support objective evaluations of the supply management training program, the measurements of training effectiveness will have to be structured around more subjective evaluation methods.

#### MANAGING THE EVALUATION PROCESS

Commandant Instruction 1550.8, *Management of Training Courses and Resources*, prescribes responsibilities and procedures for improving Coast Guard training and the interrelationships between the Headquarters supply program manager (Chief, G-ELM), the training manager, and the training source. Evaluating the effectiveness of the training program is the key to identifying the changes needed to improve it.

The Coast Guard's approach to course development is a formal process called Instructional Systems Development (ISD).<sup>1</sup> It is a systems approach in which all phases of course development are identified and related in a logical way. The evaluation phase is central and continuous in course development, implementation, and updating. Internal evaluation measures how well the training source – in most

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<sup>1</sup>The ISD process is described in *The Coast Guard Training Systems Approach* series of pamphlets prepared by the Office of Personnel and Training (G-P) and published as draft documents pending final printing as directives. Copies are available from the Performance Systems Division (G-PRF).

instances, one of the Coast Guard Training Centers – performs the training. External evaluation is the formal measurement of whether graduates can do the job for which they were trained. In the ISD process, evaluating training is a planned and integral part of the cycle and involves the program manager, the training manager, and the training source:

- The *supply program manager* [Chief, Logistics Management Division, Office of Engineering and Development (G-ELM)] identifies the problems arising from mission, regulation, procedure, or system changes or performance deficiencies that are considered solvable by training, and consults with the training manager on potential training solutions.
- The *training manager* [Chief, Performance Systems Division, Office of Personnel and Training (G-PRF)] establishes policy and procedure for external evaluation, assists the program manager in developing external evaluation criteria, conducts and considers results of external evaluation in curriculum review, and coordinates the program manager's periodic course review.
- The *training source* (the Coast Guard Training Center providing training) supports and documents results of external evaluation and recommends changes to the program and training managers, and uses results of external evaluations in periodic course reviews.

The ISD process requires external evaluation of each graduate's job performance who is trained at a non-Coast Guard training source; but the procedures are not in place and are unlikely to be available for several years. Until such time as the Coast Guard participates in an inter-Service agreement to have the training source support the training manager in externally evaluating shipboard supply officer training, we believe the ISD requirement can be met by the evaluation procedure described in the following paragraphs. It should be jointly developed and executed by managers of the supply program (G-ELM) and the training program (G-PRF). When the Training Center, Petaluma, becomes the training source for the Coast Guard's supply management training, the appropriate responsibility for the external evaluation by former students and the students' supervisors/commanders is readily transferable to the Training Center. The supply program manager can continue to exercise the remaining responsibility prescribed by the ISD process.

## EVALUATING TRAINING EFFECTIVENESS

The primary goals in evaluating the effectiveness of supply management training are to determine whether any changes are needed in the course to produce a



more knowledgeable and capable shipboard supply officer and if so, what those changes are. The supply program manager needs a well-planned and organized procedure to collect information with which to evaluate the effectiveness of supply officer training. That procedure should answer the following questions:

- Is the supply officer adequately prepared for the responsibilities of the position?
- How well does the supply officer manage the supply department?
- Does the supply officer's performance achieve the desired results?

On the basis of the information generated in the evaluation, the supply program manager advises the training manager and the training source of any changes needed in the curriculum or of increases or decreases in emphasis on specific subjects. Additionally, by structuring the evaluation procedures to solicit the same information from different perspectives and at different points in time, the supply program manager can acquire more comparable and consistent data and thus have greater reliability in the evaluation of the relationship of training to performance and the effect training changes have on management improvements.

When standard quantitative measures of supply performance are in place and routinely generated for review, the supply program manager will have information that should assist in the analysis and objective evaluation of training effectiveness. For the near-term, we believe training effectiveness should be subjectively evaluated in a feedback procedure that provides personal, command, and technical channel input to the supply program manager. The three elements of the procedure we recommend are: (1) the supply officer's posttraining program review, (2) the commanding officer's performance analysis, and (3) the supply program manager's technical assistance visit. The results are the input for evaluating training effectiveness and identifying the changes needed to improve the supply officer's capability to manage the supply department.

### **Supply Officer's Posttraining Review**

The first element in our recommended evaluation procedure is the supply officer's assessment of the training course and its contribution to his/her ability to

handle the assigned responsibilities. The medium for conducting the supply officer's posttraining review is a feedback survey administered at the following intervals:

- Immediately following graduation
- Nine to 12 months after completion of training or midway through the initial assignment if it is for less than 18 months
- Upon completion of the initial assignment as a supply officer or, for F&S warrant officers, as an assistant supply officer.

The purpose of the survey is to get the supply officer's input at critical points in the initial assignment. It should be geared to identify the areas in which he/she is undertrained or overtrained and areas in which the training is inapplicable. Repeating the survey at different points in time allows experience and maturing in the assignment to be factored into the answers. The responses to the survey form the basis for changes to the curriculum.

We have prepared a posttraining review survey, and it is shown at Appendix B. Our survey is structured on the lines of the external evaluation depicted in the *Evaluation* pamphlet<sup>2</sup> and is similar to one that has been used in the past to assess training of Air Force supply officers.<sup>3</sup>

Since we recommend the Coast Guard use the SILO course as the near-term training program, our survey is designed with the curriculum of that course in mind. Because the present curriculum is standardized to the Navy system, little opportunity is available to delete, add, or emphasize core subjects. Any possible changes are more apt to be in the form of supplemental or clarifying information provided by the Coast Guard supply program manager directly to the shipboard supply officer. As the course is modified to include Coast Guard-unique topics and an officer is detailed to the instructor staff, changes can be introduced as addenda to the core curriculum. When supply officer training becomes a course at the Training Center, Petaluma, the survey results can be more efficiently and effectively used as direct changes to improve the curriculum.

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<sup>2</sup>The ISD process is described in *The Coast Guard Training Systems Approach* series of pamphlets prepared by G-P. *Evaluation* is one pamphlet in that series.

<sup>3</sup>Brodeur, Edmund R., and Karen W. Currie. *Assessment of Initial Technical Training for USAF Supply Officers*. Master's Thesis on Logistics Management. Air University, Air Force Institute of Technology. Wright-Patterson Air Force Base, Ohio. Sep 1984.

## **Commanding Officer's Analysis of Supply Officer Performance**

The second element in the recommended training evaluation procedure – the commanding officer's analysis of the supply officer's performance – accomplishes the following goals:

- It provides the supply program manager with a direct assessment of the supply officer's management capabilities.
- It implies – in terms of the supply officer's success or failure – how well the central supply department is supporting the unit.

The supply program manager realizes several advantages from the commanding officer's analysis:

- It is a direct communication on the supply officer's management ability.
- It identifies supply support problems and the processes used to deal with them.
- It provides an insight into the unit level supply operation and an oversight of the centralized supply system.
- It contributes to a special supply officer information file for future coordination of assignments in the supply management career pattern.

The commanding officer's analysis should be a letter style report in response to a request from the supply program manager. It should focus on the shipboard supply officer's internal and external responsibilities. Internal ones are those related to shipboard supply support for the unit's operating departments and its other support departments. External responsibilities are those related to the ability to communicate, monitor, and pressure the external supply system to obtain better support for the unit. The supply program manager needs the commanding officer to answer the following questions in the analysis:

- What did you expect the supply officer to do or be able to do?
- Was the supply officer prepared to fulfill the responsibilities you assigned to him?
- How well did he/she do?
- Did a lack of training prevent him/her from being able to do more or to do better?

- What particular training does a supply officer need to meet your expectations and improve his/her value to the unit?
- How well was the supply officer trained to deal with support system failures?
- How did he/she overcome the system failures?
- Where can his/her experience be best applied in future assignments?
- How well did the support system meet your needs?

The supply program manager should solicit the commanding officer's evaluation twice during the supply officer's assignment. The first report should be submitted 6 – 9 months after the supply officer assumes responsibility for the supply department, and the second should be submitted upon completion of the assignment as the unit's supply officer. The first report provides an assessment of the skills the supply officer has acquired from the supply training course after enough time has passed for a significant number of those skills to be called upon and while the commanding officer can still recall the supply officer's initial capability. The second and final report provides the assessment of the supply officer's capability to expand the formally acquired skills through experience gained from managing supply problems and the maturity gained from building a review, analysis, and communication network both internal and external to the unit.

### **Technical Assistance Visit**

The third element of the procedure for evaluating the supply performance is the technical assistance visit. After the unit level organizational changes required to establish centralized shipboard supply departments have been completed, the Coast Guard should provide a technical assistance program to the units. Under the direction of the supply program manager, a formal program should be implemented by the two Inventory Control Points (ICPs).

A technical assistance visit to a unit by the ICP's customer liaison representative has several advantages:

- It provides an on-site view of the supply officer's performance and the supply department's operations.
- It offers the opportunity to discuss shortfalls in technical knowledge and management techniques that more or different training can eliminate.

- It provides a customer-level (the unit) view of the supply system's qualities and deficiencies.
- It allows the shipboard supply officer to comment on supply system or procedural changes under consideration.
- It provides the opportunity to disseminate information on any improvements that other units have made in communications and support.

Because of the number of units involved, an ICP customer liaison representative will likely visit each unit only once every 2 years. However, if the supply program manager coordinates the ICP visits to alternate with those of the Area Maintenance and Logistics Command (MLC) Inspection Team (which also visits each unit once every 2 years), it is possible for a technical assistance visit to be made to each unit once a year. The supply representative on the Area MLC Inspection Team can provide the technical assistance when that team visits a unit.

The ICP or Area MLC Inspector assists the supply officer by identifying any shortfalls in the supply officer's knowledge or management technique and resolving any technical problems found at the unit. Such problems or technical deficiencies that are training related are reported to the supply program manager along with recommended resolutions. If a particular problem is found in several units, the supply program manager can make it a special interest item for the technical assistance visits to determine if there is a need for an extensive training requirement.

The supply program manager uses information from these visits to determine whether problems are training-related and how critical they are to the unit's supply operation. If noncritical, the necessary change can be provided to the training manager for inclusion in the next curriculum revision. Besides providing information to the supply department crew experiencing the problem, the technical assistance team can provide information on critical problems for publication in a training bulletin or instruction that can be distributed so the information on resolving the training shortfall is available to all the units.

The technical assistance visit is a proven and effective method of extending the supply program manager's interests and influence throughout the supply support system. By having the ICPs and Area MLCs provide technical assistance as part of their on-going programs, each unit can expect an assistance visit in the supply support and command channels on alternate years. The unit benefits from the

visibility given to it on support problems and the supply program manager receives current information on the systems performance and is able to detect difficulties in delivering support earlier.

## SUMMARY

Evaluating training effectiveness is a key phase of the Coast Guard's ISD process. We recommend in the near-term a three-element external evaluation procedure through which the supply program manager is able to evaluate the effectiveness of Coast Guard supply support and identify any changes needed to improve the supply officer's ability to manage the shipboard supply system. By having the ICPs and the Area MLCs perform technical assistance visits, the supply program manager is able to acquire additional evaluation information reflecting the command and technical channels of the supply support system. All three elements of the evaluation are primarily focused on identifying shortfalls in knowledge or management technique and correcting those deficiencies through changing the curriculum, adding emphasis to specific subjects, and publishing supplemental training information to the field.

## RECOMMENDATIONS

Commandant Instruction 1550.8 and the *Evaluation* pamphlet of the ISD series are suitable guides for structuring the supply program manager's procedure for evaluating the effectiveness of supply officer's training. Because the ISD process does not currently extend to the Navy Supply Corps School's carrying out the training source responsibilities for the Coast Guard, we recommend the evaluation procedure be jointly developed and executed by the Coast Guard supply program manager and training manager. Additionally, we recommend that the evaluation procedure include three sources – the shipboard supply officer, the commanding officer, and the technical assistance visit – and that the primary focus of their evaluation be on identifying how well the supply officer is prepared to fulfill his responsibilities. We recommend that the unit's commanding officer and the Area MLCs and the ICPs be tasked by the Commandant (G-ELM) to support the external evaluation as part of their command and technical channel responsibility.

We believe that the most effective use of information obtained through the evaluation procedure will occur when the Training Center, Petaluma, is established as the training source for all supply management training. Until the Training

Center, Petaluma, is the site of the resident course, we recommend it be directly involved to the extent possible and consistent with the ISD process in the external evaluation. Its participation in preparing evaluation report formats and contents and subsequent review of information will assist in developing the future supply management course and provide immediate input for changes in the existing Storekeeper course.

## GLOSSARY

DoD	=	Department of Defense
F&S	=	Fiscal and Supply
FRAM	=	Fleet Rehabilitation and Modernization
G-ELM	=	Logistics Management Division, Office of Engineering and Development
G-P	=	Office of Personnel and Training
G-PO	=	Officer Personnel Division, Office of Personnel and Training
G-PRF	=	Performance Systems Division, Office of Personnel and Training
HQ	=	Headquarters
ICP	=	Inventory Control Point
ISD	=	Instructional System Development
MLC	=	Maintenance and Logistics Command
NAVSUP	=	Navy Supply Systems Command
NSCS	=	Navy Supply Corps School
OPTAR	=	Operating Target
SILO	=	Supply Indoctrination for Line Officers
SK	=	Storekeeper
SNAP II	=	Shipboard Nontactical Automated Data Processing Program
WHEC	=	High Endurance Cutter



## APPENDIX A

### AUTOMATED SUPPLY SYSTEM TRAINING

The Navy's Supply Indoctrination for Line Officers (SILO) course focuses instruction on management of a centralized supply department operating under manual procedures and recordkeeping. The Navy graduates of SILO are assigned to vessels that have not been converted to the standard shipboard nontactical automated supply management system, commonly known as SNAP II (Shipboard Nontactical Automated Data Processing Program). While the Navy is currently considering the use of a version of SNAP II for the nonconverted vessels, it has no definitive plan for design or development. Using the SILO course for training its supply officers in manual operations creates a problem in making a decision on the long-term plan for training Coast Guard officers in using an automated supply management system.

The Coast Guard has assigned the Chief, Logistics Management Division (G-ELM) responsibility for directing development of a standard automated unit level supply management system as the focal system for integrating various logistics functions. The purpose of the unit level supply management system is to: (1) integrate other functions related to supply such as equipment/equipage/property accounting and reporting, (2) prepare and distribute the budget and record and report expenses, (3) prepare local purchase requests and maintain document control, and (4) plan maintenance support and reparable management. The integration of data through an automated system gives the supply officer and other department heads a greater capability to manage critical resources — time, money, materiel — in a standard manner throughout the Service. The supply officer's training program should include a course of instruction in the management techniques associated with using the automated system if the full benefits of automation are to be realized. The SILO course is structured toward manual procedures and is not a source for training in automated system operation and management.

The second aspect of the problem arises from a potential Navy decision to include training on a smaller vessel version of SNAP II in the SILO curriculum.

Such instruction would provide Coast Guard officers with little more than an automated system orientation since the Coast Guard automated system for the cutter's supply department operation will likely be different from the smaller vessel SNAP II system. A decision to implement different automated supply management systems aboard Coast Guard cutters and Navy vessels becomes a significant factor in the decision to establish the Coast Guard's own program for training its supply officers.

## **APPENDIX B**

### **SUPPLY OFFICER'S POSTTRAINING REVIEW**

#### **INTRODUCTION**

The Supply Indoctrination for Line Officers (SILO) course conducted at the Navy Supply Corps School is designed to train a non-Supply Corps officer in the fundamentals of shipboard supply management and to qualify that officer to manage the ship's supply department when the unit is not authorized a Supply Corps officer billet.

The Coast Guard officers who attend the course are those selected for assignment as supply officer or assistant supply officer aboard an icebreaker, a high endurance, or a medium endurance cutter. Those officers are a valuable source of feedback on the applicability of the course's contents to the responsibilities assigned to the cutter's supply department and to the preparation of the officer to manage the supply department.

The purpose of a post-SILO training review program is to acquire information from the officers at several intervals after training:

- Immediately following completion of training
- Nine to 12 months after completion of training or midway through their assignment if for less than 18 months
- Upon completion of their initial assignment as a shipboard supply officer or assistant supply officer.

The information gained in those reviews is the basis for determining whether the SILO course provides the fundamental knowledge to head the supply department and properly prepares the officer for that responsibility. Additionally, the information is important to decisions on training alternatives and allocating resources for tailoring the SILO course and establishing a separate supply management training program under Coast Guard control.

## **REVIEW FOLLOWING COMPLETION OF TRAINING**

The first review occurs immediately upon completion of training and represents the officer's opinion uninfluenced by any attempt to apply the knowledge in an operational setting. It is more likely to reflect the quality of the instructor's teaching methods and the officer's evaluation of the importance of the material. The later reviews are expected to better reflect the applicability of the material to the actual shipboard management requirement.

The initial review addresses three main issues:

- The usefulness of the SILO course in preparing the officer to manage the supply department's performance of its major responsibilities.
- The depth of coverage of each module/subject presented in the SILO course.
- Preparation of the officer for the initial assignment to the supply department.

The follow-up review is made after the supply officer has had an opportunity to engage most of his/her responsibilities, encounter technical and operational problems, and exercise leadership and management skills in providing supply support to the unit. Those experiences produce a more mature, seasoned evaluation of the effectiveness of supply management training.

The survey form for the initial and the follow-up reviews is presented as Annex 1.

The supply officer's final evaluation should be prepared as he/she nears the end of a tour of duty and should be submitted upon completion of an assignment as the supply officer. The purpose of this evaluation is to elicit the highlights – positive and negative – of the assignment, the major problems encountered and how they were solved, the condition of the unit's supply operation, and what aspects of the supply operation should be emphasized or added to the training course to help new supply officers be more effective. The evaluation should be a letter report, providing a candid narrative, and addressed to the Chief, Logistics Management Division,

Office of Engineering and Development (G-ELM). The outgoing supply officer's views are of dual importance to G-ELM:

- They are a first-hand opinion of the system that prepared and supported the supply officer during his tour.
- They present a valued judgment on the state of the unit's supply operation, i.e., the challenges facing the supply officer's replacement.

Over time, the Chief, Logistics Management Division – the supply program manager – builds a baseline for detecting the systemic, long-standing problems and for evaluating progress from one supply officer to the next in resolving the problems unique to a particular unit.

**ANNEX 1**  
**SILO TRAINING REVIEW**  
**POSTTRAINING REVIEW**

**PART I: MANAGEMENT OF SUPPLY DEPARTMENT**

The following is a list of the supply department's responsibilities. Please evaluate the usefulness of the Supply Indoctrination for Line Officers (SILO) course in preparing you to assume those responsibilities.

We have listed six options from which you should select one. Next to the word "Rating" after the responsibilities listed in A through Q below, place the number of the statement that best describes your opinion.

1 – Very useful

2 – Useful

3 – Somewhat useful

4 – Neither useful nor useless

5 – Somewhat useless

6 – Useless

- A. Determining stock levels of all supplies and repair parts, including demand supported, nonallowance items

Rating: \_\_\_\_\_

- B. Requisitioning and managing the requisitioning of all material requirements

Rating: \_\_\_\_\_

- C. Local purchasing of supplies and services

Rating: \_\_\_\_\_

- D. Receiving, storing, and issuing repair parts, spares, and general supplies

Rating: \_\_\_\_\_

- E. Accounting, inventorying, and physically controlling supplies and repair parts

Rating: \_\_\_\_\_

F. Maintaining all allowance documentation

Rating: \_\_\_\_\_

G. Accounting for the status of the cutter's equipment and equipage configuration and personal property

Rating: \_\_\_\_\_

H. Verifying the accuracy of OPNAV Forms 4790/CK and ensuring a response is received

Rating: \_\_\_\_\_

I. Preparing and submitting Allowance Change Request documentation

Rating: \_\_\_\_\_

J. Cost accounting and cost analysis

Rating: \_\_\_\_\_

K. Shipboard-level centralized funding of repair parts and general supplies

Rating: \_\_\_\_\_

L. Interfacing with supply support levels above the cutter

Rating: \_\_\_\_\_

M. Serving as point of contact for supply assistance, inquiries, and inspections external to the cutter

Rating: \_\_\_\_\_

N. Serving as point of contact for all supply related problems internal to the ship

Rating: \_\_\_\_\_

O. Conducting ongoing training of cutter personnel in supply-related matters

Rating: \_\_\_\_\_

P. Interfacing the cutter's maintenance support requirements and program to the supply department's operational requirements

Rating: \_\_\_\_\_

Q. Preparing budgets, distributing them to departments, and reviewing operating expenses against budget

Rating: \_\_\_\_\_

## PART II: DEPTH OF COVERAGE OF SILO COURSE MODULE/SUBJECTS

The SILO course is presented in five modules, and many subjects are covered in each module. The depth of coverage relates to both the detail and the applicability to the Coast Guard's (CG) method of performance.

On a scale of one to three, enter the number that most closely corresponds to the following opinion on the coverage provided in the following modules and subjects.

- 1 – Needs less depth
- 2 – Appropriate depth
- 3 – Needs more depth

- 1 – Not applicable to the CG
- 2 – Potentially applicable
- 3 – Applicable to the CG

	Ratings	
	<u>Depth</u>	<u>Applicability</u>
A. Supply System Overview Module		
• Supply system overview	_____	_____
• Supply support organization	_____	_____
• Appropriations/OPTARS/UICs	_____	_____
• NSF/APA	_____	_____
• Accounting and Disbursing/Fund Codes	_____	_____
• Integrated Navy Supply System	_____	_____
B. Configuration Management, COSAL, and Material Identification Publications		
• Ship's configuration overview	_____	_____
• Identification numbers	_____	_____
• HM&E, Ordnance, and Electronic COSAL	_____	_____
• Other allowance and configuration documents	_____	_____



		Ratings	
		<u>Depth</u>	<u>Applicability</u>
<ul style="list-style-type: none"> <li>● Management Lists – Navy, Master Cross Reference Lists</li> <li>● Afloat shopping guide, GSA and Federal supply catalogs</li> <li>● Repairables management: Depot Level; Master Repairable Item List</li> <li>● Special handling and hazardous item lists</li> <li>● Navy stock list of publications and forms</li> </ul>		_____	_____
		_____	_____
		_____	_____
		_____	_____
		_____	_____
C. Inventory Management, Shipboard Issue, and Procurement Module			
● Introduction to inventory management		_____	_____
● Stock records		_____	_____
● Issue/requisition document		_____	_____
● Issue from stock		_____	_____
● Not-in-stock/not-carried transactions		_____	_____
● Special inventory programs (SIM DTO, PEB, RSS)		_____	_____
● Requisitioning/OPTAR log		_____	_____
● MILSTRIP/DAAS; 1250-1 processing/distribution		_____	_____
● NORS/ANORS requisitions; CASREP message preparation		_____	_____
● Requisition file maintenance		_____	_____
● Requisition control		_____	_____
● Materiel obligation validation		_____	_____
● Underway replenishment procedures		_____	_____
● SERVMART procedures		_____	_____

		Ratings	
		<u>Depth</u>	<u>Applicability</u>
<b>D. Receipts, Periodic Financial Reports, Material Expenditures, Repairables Management, Custody Control Module</b>			
● DoD transportation system	_____	_____	
● Prereceipt actions and receipts processing (includes push material and NIS stocks)	_____	_____	
● Data adjustments upon receipt	_____	_____	
● Receipt discrepancies	_____	_____	
● MDS/ACCESS (MAD) and OPTAR Document transmittal; budget OPTAR report	_____	_____	
● Transfers of general material afloat	_____	_____	
● Transfers of material ashore (non-MTR material)	_____	_____	
● Shipment of personal effects	_____	_____	
● Supply/3M interface (documents, files, and logs)	_____	_____	
● Survey of system stocks/property book material loss, damage or destruction	_____	_____	
● Repairables management (includes MTR requisitioning and processing for turn-in)	_____	_____	
● Controlled equipage, valuables, special clothing custody control programs	_____	_____	
<b>E. Open Purchasing, COSAL Maintenance, and Financial Listings Module</b>			
● Accounting information review	_____	_____	
● Purchase ashore/pierside purchasing	_____	_____	
● Purchase afloat/invoice processing	_____	_____	

	Ratings	
	<u>Depth</u>	<u>Applicability</u>
● Purchase afloat/use of BPA, imprest fund, PO, indefinite delivery contract COSAL review	_____	_____
● COSAL maintenance	_____	_____
● Inventory procedures; processing inventory discrepancies	_____	_____
● Financial listings (use/purpose) inventory discrepancies	_____	_____
● Transaction flow for financial recording; financial listing affected	_____	_____
● Aged unfilled order list (AUOL)/summary filled order/expenditure difference list processing	_____	_____

### PART III. PREPARATION FOR ASSIGNMENT TO SHIP'S SUPPLY DEPARTMENT

Most officers attending the SILO course will have some background in supply from their prior assignments. The Fiscal and Supply (F&S) warrant officers will have prior experience as Storekeepers or Subsistence Specialists and may have served as a supply department head in a previous tour aboard ship. An engineering officer might have been extensively involved in ordering spares or repair parts for the department and in maintaining inventory/stock records. Other officers are more likely to have been "customers" of the supply department and not involved with the details of the supply support system's operations or with supply records.

The following list of statements deals with preparing for assignment as the supply officer or assistant supply officer (referred to collectively as supply officer in the statements) and as head of a cutter's supply department. On the following scale of 1 to 7, enter the number that most closely reflects your agreement or disagreement with the statement:

- |                    |                                |                       |
|--------------------|--------------------------------|-----------------------|
| 1 - Strongly agree | 4 - Neither agree nor disagree | 7 - Strongly disagree |
| 2 - Agree          | 5 - Disagree somewhat          |                       |
| 3 - Agree somewhat | 6 - Disagree                   |                       |

- A. The SILO course provides excellent preparation for a supply officer's assignment to an afloat unit.

Rating: \_\_\_\_\_

- B. The SILO course adequately prepares supply officers for an afloat tour regardless of their prior experience.

Rating: \_\_\_\_\_

- C. The SILO course presents too much supply management theory and not enough "hands-on" practical application training.

Rating: \_\_\_\_\_

- D. The SILO course provides little information that has use after the assignment as a shipboard supply officer.

Rating: \_\_\_\_\_

- E. Officers scheduled to attend the SILO course should have a prior afloat tour to gain a perspective of the complex nature of a ship's support requirements.

Rating: \_\_\_\_\_

- F. The best way to gain knowledge on management of a supply department's operations is through on-the-job training rather than through a formal training course.

Rating: \_\_\_\_\_

- G. The supply officer's primary role is to direct the technical aspects of supply support and the internal operations of the supply department.

Rating: \_\_\_\_\_

- H. The supply officer is the primary advisor to the Commander and the other department heads on planning supply requirements for maintenance, underway operations, and special projects.

Rating: \_\_\_\_\_

**NOTE:** If you want to elaborate on any area of the survey, please do so on a separate page and cross reference to the appropriate Part of the survey. You are encouraged to provide comments on any area not covered in the survey.

## ACRONYMS/ABBREVIATIONS

ACCESS	=	Afloat Consumption, Cost, and Effectiveness Surveillance System
ANORS	=	Anticipated Not Operationally Ready – Supply
APA	=	Appropriations Purchase Account
AUOL	=	Aged Unfilled Order List
BPA	=	Blanket Purchase Agreement
CASREP	=	Casualty Report
CG	=	Coast Guard
COSAL	=	Coordinated Shipboard Allowance List
DAAS	=	Defense Automatic Addressing System
DoD	=	Department of Defense
DTO	=	Direct Turnover
F&S	=	Fiscal and Supply
G-ELM	=	Chief, Logistics Management Division, Office of Engineering and Development
GSA	=	General Services Administration
HM&E	=	Hull, Mechanical, and Electrical
MAD	=	MDCS/ACCESS Data
MDCS	=	Maintenance Data Collection System
MILSTRIP	=	Military Standard Requisitioning and Issue Procedures
MTR	=	Mandatory Turn-in Repairable
NIS	=	Not-in-Stock
NORS	=	Not Operationally Ready - Supply
NSF	=	Navy Stock Fund

OPNAV	=	Office of the Chief, Navy Operations
OPTAR	=	Operating Target
PEB	=	Pre-Expended Bin
PO	=	Purchase Order
RSS	=	Ready Service Spares
SERVMART	=	Self Service Market
SILO	=	Supply Indoctrination for Line Officers
SIM	=	Selected Item Management
3M	=	Maintenance and Material Management
UIC	=	Unit Identification Code

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<p>Recently, the Coast Guard decided to centralize supply operations aboard its cutters under a supply department managed by a supply officer. As a key element in this new centralized approach, the supply officer must be selected and trained to fill the dual role of executive level department manager and technical level supply system analyst. The success of the approach depends upon how well the supply officer fulfills the role – how well he/she provides sufficient high-quality supplies to the operational departments at the lowest reasonable cost. In turn, the success of the supply officers depends strongly on their selection and training and the assistance and support provided by the command channel.</p> <p>Successful supply officers cannot be randomly selected nor casually trained. Capable supply officers will be the product of careful selection of top quality performers, training in the technical areas of supply management, the assignment of responsibilities consistent with that training, and assistance from the cutters' technical and command channels. The selection and training processes must be continually improved through evaluations of shipboard performance by a central manager who can then direct the necessary changes in the processes.</p> <p>The Coast Guard does not have a formal process for selecting and training supply officers to manage a unit's central supply department or for evaluating the effectiveness of the training. We believe it needs one and recommend that it establish a formal process with the following key elements:</p> <ul style="list-style-type: none"> <li>• A procedure that selects officers with demonstrated leadership and managerial abilities. Additionally, the selection procedure should consider</li> </ul>					
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## 19. Abstracts (continued)

the officer's willingness to deal with an intense training course and to accept the responsibilities for planning and directing a support program affecting all other departments in their unit.

- A requirement that officers attend a formal supply management training course (initially the Navy's Supply Indoctrination for Line Officers and eventually a Coast Guard-unique course) to acquire the technical skills needed to review, analyze, and direct the supply operation.
- A program for evaluating training effectiveness that involves the supply officer and the unit's commanding officer, and – as an integral part of technical assistance visits – the Inventory Control Points' customer liaison offices, and the Area Maintenance and Logistics Commands' inspection offices.
- A method for reviewing training shortfalls and correcting those training deficiencies through changes in curriculum topics, emphasis on specific subjects, or publication of supplemental training information.

Additionally, we recommend the process be placed under the Coast Guard headquarters staff supervision of the Chief, Logistics Management Division, Office of Engineering and Development, as an adjunct to its responsibilities as the supply program manager. The Officer Personnel and the Performance Systems Divisions, Office of Personnel and Training, should assist the Logistics Management Division in planning, developing, and implementing supply officer selection, training, training effectiveness evaluation, and training curriculum improvements.

The supply officer's responsibilities are not easily fulfilled. He/she is expected to make efficient use of the resources placed under his/her control and to contribute to the cutter's readiness through effective support of the other departments' plans and operating requirements. A well-trained, challenged, and committed officer will meet those expectations and will find the supply department assignment aboard ship to be an enhancer to his/her career, self-confidence, and capabilities. He/she carries that first-hand experience to future assignments and is able to be more effective because he/she realizes the benefits possible through well planned, coordinated, and integrated management of supply support.